

RightNow Metrics™ 4.1 to 4.3

A Better Way to Serve Your Customers

SmartConversion™ Guide

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P.O. Box 9300

40 Enterprise Boulevard

Bozeman, MT 59718

Toll Free: 877-363-5678

Main Phone: 406-522-4200

Web address: <http://rightnow.com>

Email address: info@rightnow.com

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Introduction

Welcome to the RightNow Metrics 4.x to 4.3.x SmartConversion™ Guide. This guide contains procedures for upgrading from RightNow Metrics 4.x to RightNow Metrics 4.3.x for hosted and non-hosted customers and is intended for customers with both the Basic and Premium versions. If you are a customer with the Premium version of RightNow Metrics, you will want to consider integrating your RightNow Metrics database with RightNow eService Center 5.5 to take advantage of the new features. For more information, refer to Chapter 4, “Integration.”

To prepare for your upgrade, you will want to review not only this document, but also the *RightNow Metrics 4.3 Release Notes* and the *RightNow Metrics 4.3 New and Expanded Features* document. In addition, you will want to take the online tutorials available on our Web site at:

<http://rightnow.custhelp.com>.

Note: You must upgrade to RightNow Metrics 4.x before you can upgrade to RightNow Metrics 4.3.x. For information on upgrading from a version prior to RightNow Metrics 4.x, contact your RightNow customer service representative.

This guide is intended for RightNow administrators or any staff person responsible for configuring and administering your RightNow site and contains the following information:

Chapter 2, “Upgrade Procedures for Hosted Customers”—Contains a description of the upgrade process for hosted customers.

Chapter 3, “Upgrade Procedures for Non-Hosted Customers”—Contains a description of the upgrade process for non-hosted customers. This chapter also contains procedures for troubleshooting your upgrade and restoring a previous version of RightNow Metrics.

Chapter 4, “Integration”—Contains a description of the new integration features included in this version of RightNow Metrics. This chapter also contains procedures for integrating RightNow Metrics with RightNow eService Center or another CRM program.

Chapter 5, “Evaluating Your Upgrade”—Contains procedures for evaluating your RightNow Metrics survey data to make sure your site is functioning properly and all your data has been converted correctly.

Note: This guide will be updated periodically. The footer contains the date the document was last updated.

Upgrade Procedures for Hosted Customers

If you are hosted with RightNow Technologies and want to take advantage of the RightNow Metrics 4.3 new and expanded features, simply follow the steps listed below.

Step 1: Read the upgrade documentation and take the online tutorials—Before you can schedule an upgrade, you must read this document along with *RightNow Metrics 4.3 New and Expanded Features* and the *RightNow Metrics 4.3 Release Notes*. You should also take the appropriate online tutorials. To download the documentation and access the online training tutorials, log on to the RightNow Technologies Web site at <http://rightnow.custhelp.com>.



Step 2: Schedule an upgrade date and time—To start the upgrade process, you must schedule an upgrade date and time with RightNow Technologies by submitting an incident to our support site at <http://rightnow.custhelp.com>. We will promptly notify you whether your requested date and time is available. If this time is pre-scheduled, we will provide you with a list of dates and times that are available in proximity to your requested date and time.

Note: You will also want to review Chapter 4, “Integration,” in this document to determine if you want to integrate your RightNow Metrics 4.3.x database with your RightNow eService Center knowledge base. If you want to integrate, you will need to request this in your incident.

Step 3: Receive post-upgrade email notification—Once your RightNow Metrics site has been upgraded, you will be sent an email notifying you that your site has been successfully upgraded. If you have any questions regarding the upgrade, update your incident through the My Stuff page on our customer support site.

Step 4: Evaluate your survey data—Once your site has been upgraded, you will want to evaluate your existing survey data. For specific procedures on evaluating RightNow Metrics, refer to Chapter 5, “Evaluating Your Upgrade.”



Step 5: Become familiar with RightNow Metrics 4.3 new and expanded features—Once you have evaluated your survey data in your upgraded site, you want to become familiar with the new and expanded features of RightNow Metrics 4.3. Refer to the *RightNow Metrics 4.3 Release Notes* for a summary of new features and the *RightNow Metrics 4.3 New and Expanded Features* for a more detailed description of these features. Both documents are available for download from our Web site.

Upgrade Procedures for Non-Hosted Customers

This chapter contains procedures for upgrading RightNow Metrics 4.x to RightNow Metrics 4.3.x for customers who are not hosted by RightNow Technologies or any other hosting facility. This chapter is divided into the following sections:

- **The Upgrade Process**—Contains detailed procedures for each step of the upgrade process. Refer to “The Upgrade Process” on page 3-2.
- **Upgrade Procedures for UNIX using MySQL or Oracle**—Contains procedures for upgrading to RightNow Metrics 4.3 using UNIX platforms and MySQL and Oracle databases. You will use the RightNow setup program to execute the upgrade of your RightNow Metrics site. Refer to “Upgrade Program for UNIX Using MySQL or Oracle” on page 3-4.
- **Upgrade Procedures for Windows using MS-SQL or Oracle**—Contains procedures for upgrading to RightNow Metrics 4.3.x using Windows platforms and MS-SQL and Oracle databases. You will use the RightNow setup program to execute the upgrade of your RightNow Metrics site. Refer to “Upgrade Program for Windows NT/2000 using MS-SQL or Oracle” on page 3-11.
- **Troubleshooting**—Contains information to help you resolve issues that may occur during an upgrade process. Refer to “Troubleshooting” on page 3-22.
- **Restoring a Previous Version of RightNow Metrics**—Contains procedures for restoring a previous version of RightNow Metrics. Refer to “Restoring a Previous Version of RightNow Metrics” on page 3-23.

The upgrade methods presented in this chapter have been generalized to accommodate a wide variety of configurations, but include specific details that apply to certain platforms and databases where necessary. We highly recommend that you follow the process in this chapter, including making backups of all your RightNow files and data, creating a test site, evaluating your test site, outlining a recovery plan, and completing the test upgrade.

Note: If you are unsure about performing an upgrade due to lack of staff resources, time, or expertise, you should consider using RightNow Technologies hosting services. Our hosting facilities provide a secure environment with site monitoring and scheduled backups. Our hosting services include free upgrades for each release of our software suite. For more information about our reliable, cost-saving hosting services, visit our Web site at:

<http://rightnow.com/support/hosting.html>

The Upgrade Process

Before you upgrade to RightNow Metrics 4.3.x, you will want to back up your RightNow files and database, check the system specifications, and outline your data recovery plan. Once you upgrade, you will want to evaluate your existing survey data and review the new and expanded features listed in the *RightNow Metrics 4.3 Release Notes*. For a more detailed description of these features, refer to *RightNow Metrics 4.3 New and Expanded Features* and the *RightNow Metrics 4.3 User Manual*. All RightNow Metrics 4.3 documentation is available for download from our Web site at <http://rightnow.custhelp.com>.

This section contains general information for preparing for your upgrade, performing your upgrade, and evaluating your upgraded site when upgrading from RightNow Metrics 4.x to RightNow Metrics 4.3.x.

Step 1: Make Complete Backup Files

Before you start working on the upgrade process, we recommend creating at least two backup copies of all RightNow files and your database on separate storage devices. You should make backup files of the following:

- **All RightNow Metrics directory trees**—The default directories are as follows:

Table 3-1: Default RightNow Directory Paths

Operating Systems	RNT_Home Directory	HTML Directory	Scripts/CGI Directory
UNIX	/usr/local/rnt/rnm	/home/httpd/html/rnt/rnm	/home/httpd/cgi-bin/<interface>.cfg
Windows	C:\Program Files\Right Now Technologies\Right Now Metrics	C:\inetpub\wwwroot	C:\IntetPub\scripts\intf.cfg

If RightNow Metrics was not installed in the default directories, you can determine the directories used by viewing the following file:

- ▷ UNIX—View the file /etc/rnt/rnm.conf
- ▷ Windows—View the registry entries in HKEY_LOCAL_MACHINE> Software>Right Now Technologies>RightNow Metrics

Note: You will also need to enter these directory paths in the upgrade program.

If you are required to upgrade from an earlier version of RightNow Metrics, back up the directories and database and test the basic functionality of the site after each upgrade. If a problem should arise during an upgrade process, these backup files will allow you to restore the latest version of RightNow Metrics rather than starting from the earliest version of the product. To test the basic functionality of your site, refer to Chapter 5, “Evaluating Your Upgrade.”

- **RightNow Metrics database**—If a problem should occur during the upgrade process and you do not have backup files of your database, you risk irretrievably losing your survey data.

Step 2: Check System Specifications

Prior to creating a RightNow Metrics 4.3 test site, you need to verify that your hardware and software meet the system requirements. For the system requirements of the current version of RightNow Metrics, refer to Answer ID 31 in the RightNow Technologies Customer Support knowledge base at <http://rightnow.custhelp.com>.

Step 3: Outline a Recovery Plan

A recovery plan is a clearly defined set of steps to restore the pre-upgrade backup of RightNow Metrics. With a recovery plan, if issues arise during the upgrade process, you can quickly revert to your previous 4.x site and database and immediately resume your support operations. You can then troubleshoot the upgrade without affecting your production site. Use the following criteria to develop your recovery plan:

- Determine the point at which you will revert to the pre-upgrade backup site or length of time you will wait before reverting to the backup site.
- Download or locate the RightNow Metrics installation program for the version you are currently running (for example, 4.0). Depending on the extent of difficulties, you may need to reinstall RightNow Metrics on your Web server.
- Determine the location of the backup copies of RightNow Metrics directories and files and the most current database backup that will be used.

For procedures on restoring your pre-upgrade site, refer to “Restoring a Previous Version of RightNow Metrics” on page 3-23.

Step 4: Execute the Upgrade

You are now ready to upgrade to RightNow Metrics 4.3.x. Follow the procedures in “Upgrade Program for UNIX Using MySQL or Oracle” on page 3-4 or “Upgrade Program for Windows NT/2000 using MS-SQL or Oracle” on page 3-11, depending on your platform and database.

Step 5: Evaluate your Upgraded Site

After the upgrade is completed, you should evaluate features, functionality, and your RightNow Metrics survey data. For specific procedures, refer to Chapter 5, “Evaluating Your Upgrade.”

Step 6: Transition to RightNow Metrics 4.3.x

You are now ready to create new surveys using RightNow Metrics 4.3. Review the new features listed in the *RightNow Metrics 4.3 Release Notes*. For a more detailed description of these features, refer to *RightNow Metrics 4.3 New and Expanded Features* and the *RightNow Metrics 4.3 User Manual*.

Upgrade Program for UNIX Using MySQL or Oracle

Upgrading your RightNow software requires that you download the software from the RightNow Technologies Web site. You must also have the correct user permissions to install the software.

Note: If you are using RightNow Web 3.1 or lower, you will need to upgrade to version 4.0.x before upgrading to RightNow Metrics 4.3.x.

1. Contact RightNow Technologies Customer Support for the download page URL and password information. To assist us in keeping our records current and to enable us to provide you with the correct version of RightNow Metrics, include your platform, database, and Web server information, including version numbers.

▷ Web: <http://rightnow.custhelp.com>

▷ Email: support@rightnow.com

A customer service representative will send you the URL for the appropriate version of RightNow Metrics to use with your operating system and database. Write down the location of the download in case you need it for future reference.

Note: If you have installed RightNow Metrics in a language other than English, the upgrade program will automatically recognize the language and upgrade accordingly.

2. Log on to the system as a user who has execute permissions to modify the CGI and HTML root directories (usually root). Change directories to where you downloaded the setup file. Unpack the file by typing the following at the command prompt:

```
gunzip rnm*tar.gz.
```

Note: If you are installing on a Solaris platform, you must use GNU tar. You can download a precompiled binary of GNU tar from the following Web site:

<http://www.gnu.org/software/tar/tar.html>

3. Untar the file by typing the following at the command prompt:

```
tar xvf rnm*.tar.
```

A directory named `rnm-<release>_<platform>_<database>`, for example `rnm-4.3_linux_mysql`, will be created containing the following files and directories:

Table 3-2: File/Directory Definitions

File/Directory	Explanation
cgi-bin	This directory contains the <interface>.cfg directory and files to be installed in your cgi-bin directory.
doc_root	Caution! This directory contains images, style sheets, and other files to be installed in your HTML documents directory.
rnt_home	This directory contains utility programs and support files to be installed in your RightNow home directory.
crontabfile	This file contains sample RightNow Metrics crontab entries.

Table 3-2: File/Directory Definitions (Continued)

File/Directory	Explanation
install.sh	This file is the RightNow Metrics install script.

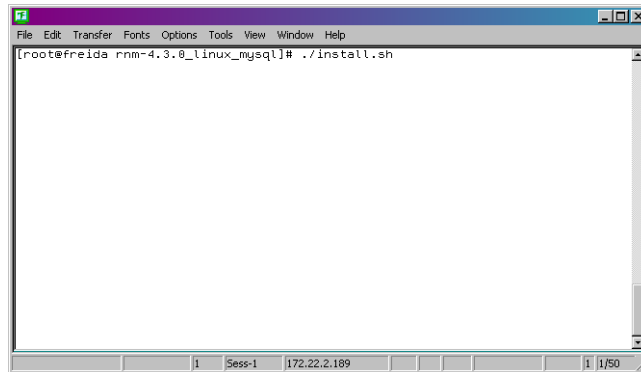
4. Verify that you have the correct user roles for Oracle or user privileges for MySQL. If you are using Oracle, the user must have connect and resource roles. If you are using MySQL, the user must have the following privileges: select, insert, update, delete, create, drop, reload, shutdown, process, alter, index, and file.

Note: If the RightNow Metrics upgrade program encounters locked files, you will be required to reboot your server to commit final changes.

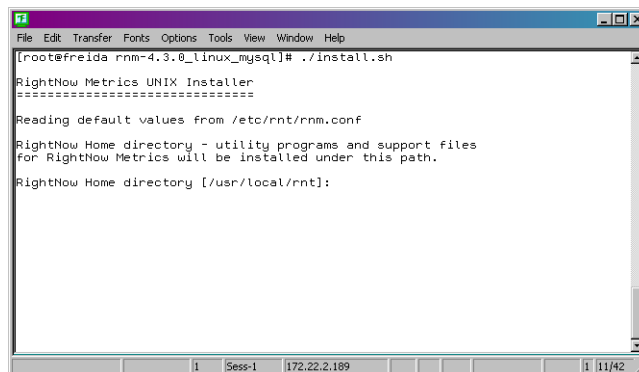
Running the Upgrade Program for UNIX

The windows displayed precede the accompanying instructions. To cancel from the install program at anytime, press **Ctrl+C**.

1. Make sure you are logged on to the Web server with full administrative privileges (usually root).
2. Change directories to the `rnm-<release>_<platform>_<database>`, for example `rnm-4.3_linux_mysql`. This is the directory created after unpacking RightNow Metrics.

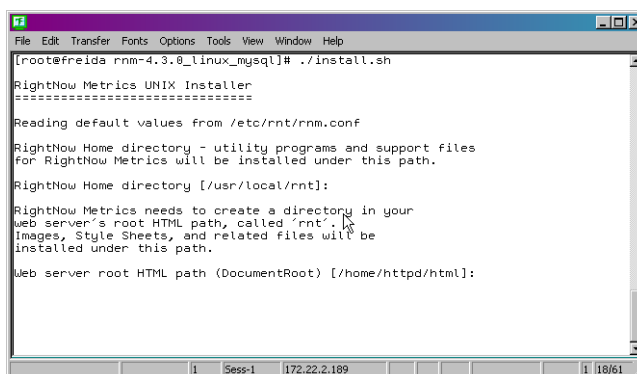


3. Type the following at the command line to install RightNow Metrics:
`./install.sh.`
Press **Enter** to continue.



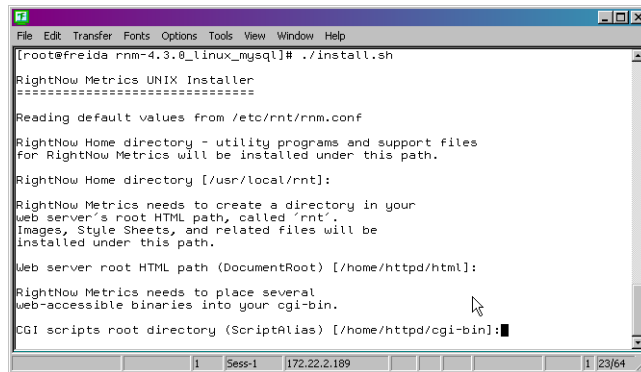
```
[root@freida rnm-4.3.0_linux_mysql]# ./install.sh
RightNow Metrics UNIX Installer
=====
Reading default values from /etc/rnt/rnm.conf
RightNow Home directory - utility programs and support files
for RightNow Metrics will be installed under this path.
RightNow Home directory [/usr/local/rnt:]
```

4. Press **Enter** to accept the default RightNow Metrics Home directory or type the desired the directory path and press **Enter**. This directory contains RightNow utilities and the files shared between interfaces.



```
[root@freida rnm-4.3.0_linux_mysql]# ./install.sh
RightNow Metrics UNIX Installer
=====
Reading default values from /etc/rnt/rnm.conf
RightNow Home directory - utility programs and support files
for RightNow Metrics will be installed under this path.
RightNow Home directory [/usr/local/rnt:]
RightNow Metrics needs to create a directory in your
web server's root HTML path, called 'rnt'.
Images, Style Sheets, and related files will be
installed under this path.
Web server root HTML path (DocumentRoot) [/home/httpd/html:]
```

5. Press **Enter** to accept the default Web server HTML path or type the desired directory path and press **Enter**. This directory contains the RightNow Metrics files and images. This value needs to match your Web server configuration.

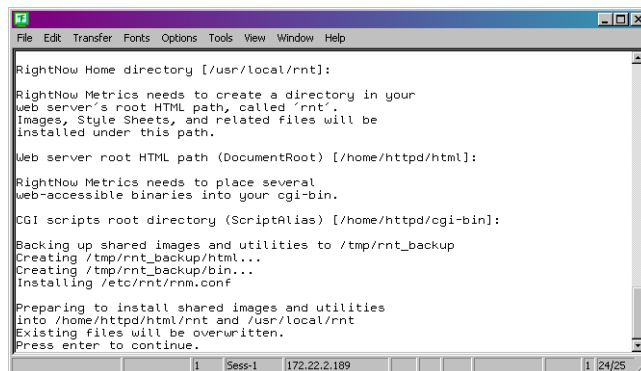


```

[root@Freida rnm-4.3.0_linux_mysql]# ./install.sh
RightNow Metrics UNIX Installer
=====
Reading default values from /etc/rnt/rnm.conf
RightNow Home directory - utility programs and support files
for RightNow Metrics will be installed under this path.
RightNow Home directory [/usr/local/rnt]:
RightNow Metrics needs to create a directory in your
web server's root HTML path, called 'rnt'.
Images, Style Sheets, and related files will be
installed under this path.
Web server root HTML path (DocumentRoot) [/home/httpd/html]:
RightNow Metrics needs to place several
web-accessible binaries into your cgi-bin.
CGI scripts root directory (ScriptAlias) [/home/httpd/cgi-bin]:

```

6. Press **Enter** to accept the default scripts directory or type the desired directory path and press **Enter**. This directory contains the CGI applications.

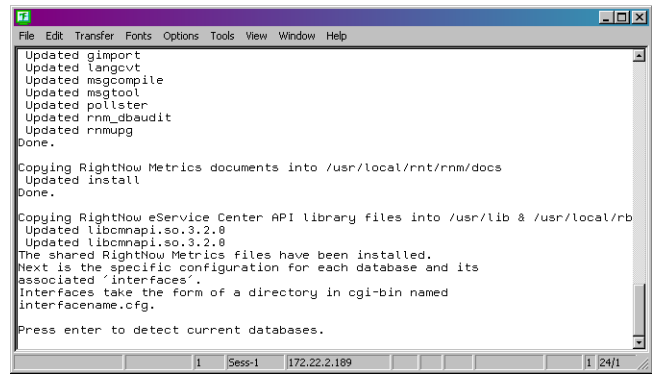


```

[root@Freida rnm-4.3.0_linux_mysql]# ./install.sh
RightNow Metrics UNIX Installer
=====
Reading default values from /etc/rnt/rnm.conf
RightNow Home directory - utility programs and support files
for RightNow Metrics will be installed under this path.
RightNow Home directory [/usr/local/rnt]:
RightNow Metrics needs to create a directory in your
web server's root HTML path, called 'rnt'.
Images, Style Sheets, and related files will be
installed under this path.
Web server root HTML path (DocumentRoot) [/home/httpd/html]:
RightNow Metrics needs to place several
web-accessible binaries into your cgi-bin.
CGI scripts root directory (ScriptAlias) [/home/httpd/cgi-bin]:
Backing up shared images and utilities to /tmp/rnt_backup
Creating /tmp/rnt_backup/html...
Creating /tmp/rnt_backup/bin...
Installing /etc/rnt/rnm.conf
Preparing to install shared images and utilities
into /home/httpd/html/rnt and /usr/local/rnt
Existing files will be overwritten.
Press enter to continue.

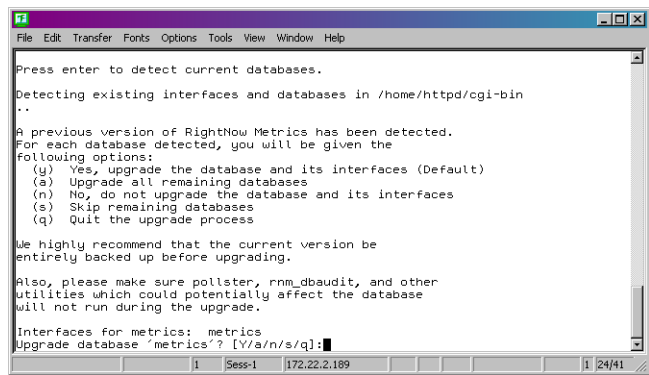
```

7. Press **Enter** to install the shared images and utilities.



8. Press **Enter** to detect current databases.

Note: This detects only databases installed on the local server.



9. The RightNow installer will detect the interfaces for RightNow Metrics. Choose an option from Table 3-3 and press **Enter**.

Table 3-3: Upgrade Options for Interfaces

Option	Action
y	Choose this option to upgrade the database and all its interfaces.
a	Choose this option to upgrade all remaining databases.
n	Choose this option if you do not want to upgrade the database and its interfaces.
s	Choose this option to skip all remaining databases.

Table 3-3: Upgrade Options for Interfaces (Continued)

Option	Action
q	Choose this option to quit the upgrade process.

Note: We strongly recommend backing up the database before upgrading.

```

- cgi-bin/rightnow.cfg/usage => /home/httpd/cgi-bin/metrics.cfg/usage
- cgi-bin/rightnow.cfg/php => /home/httpd/cgi-bin/metrics.cfg/php

Generating crontabfile
Generating php.ini
Installing php
Installing Configuration Editor

Upgrade completed successfully.
Deleting backups in /tmp/metrics

If you experience difficulties, please check the configuration
settings at the following URL:
http://localhost/cgi-bin/(interfacename).cfg/php/editui/login.php

Make sure your web server and database are running, and open
http://localhost/cgi-bin/(interfacename).cfg/metrics
in your web browser to run RightNow Metrics.
Deleting backups in /tmp/rnm_backup

Installation history has been saved in ./install.log

[root@freida rnm-4.3.0_linux_mysql]#

```

10. The upgrade process is complete. A log file, *install.log*, contains a record of each function performed during the upgrade. If any problems occurred during the upgrade, you can view this file to troubleshoot the problem. If you contact RightNow Technologies Customer Support for assistance, attach this file when you update your incident.
11. Verify that the existing crontab entries contain all entries that are in the crontabfile delivered in this release. If you do not see an entry for *pollster* or if the entries differ, you need to edit or replace the old crontab.

Note: The format of command line parameters required for RightNow Metrics utilities may change from release to release.

RightNow Metrics uses crontab to process surveys and send notifications through the utility *pollster*. The RightNow Metrics crontab entries are located in a file named crontabfile in the rnm-<release>_<platform>_<database> directory.

To install the RightNow Metrics crontab, identify a user that has permission to access the RightNow Metrics crontabfile. Log in as that user and install or edit the crontabfile. This can be done by executing the command:

```
crontab < crontabfile
```

Note: Executing this command will remove any existing crontab entries for that user. Use “crontab -e” to edit and add entries to an existing crontab.

For more information, refer to Chapter 11, “Utilities” in the *RightNow Metrics 4.3 User Manual*.

12. To open RightNow Metrics, type the following URL in your Web browser:

```
http://<your_domain>/cgi-bin/<your_interface>.cfg/metrics
```

Modified Directory Structure

During the installation, you have added or modified the following RightNow directories and files.

- RNT_Home directory (by default, /usr/local/rnt)—This directory contains RightNow Metrics utilities and support files.
- HTML documents directory (by default, /home/httpd/html)—This directory contains HTML files, images, and CSS files used to display the RightNow Metrics Web pages. Also contained is the dictionary used for the spell check feature.
- Scripts/CGI directory (by default, /home/httpd/cgi-bin)—This directory contains the .cfg directory and the *schedule.bat* file. The .cfg directory contains the RightNow Metrics executable, PHP executable, configuration setting files, and message base files.
- ETC directory (by default, /etc/rnt)—This directory contains the *rnm.conf* file that stores the directory paths for the three RightNow directories you specified during the installation.

Upgrade Program for Windows NT/2000 using MS-SQL or Oracle

This section contains procedures for upgrading RightNow Metrics 4.x to RightNow Metrics 4.3.x for Windows NT 4.0/2000 platforms using MS-SQL or Oracle databases. If you are running a version of RightNow Metrics earlier than 4.x, you will first need to upgrade to RightNow Metrics 4.1.x, and then upgrade to RightNow Metrics 4.3.x. For information on upgrading from a version prior to RightNow Metrics 4.x, contact RightNow Technologies Customer Support.

Preparing to Run the Upgrade Program

Upgrading requires that you download the software from the RightNow Technologies Web site. You must also have the correct user permissions to install the software.

1. Contact RightNow Technologies Customer Support for the download page URL and password information. To assist us in keeping our records current and to enable us to provide you with the correct version of RightNow Metrics, create an incident and include your platform, database, and Web server information, including version numbers.

▷ Web: <http://rightnow.custhelp.com>



▷ Email: support@rightnow.com

A representative will send you the URL for the appropriate version of RightNow Metrics for the operating system, database, and language you are using. Write down the location of the download to use it for future reference.

2. Verify that you have the correct user roles for Oracle or user privileges for MS-SQL. If you are using Oracle, the user must have connect and resource roles. If you are using MS-SQL, the user must have db_owner and public roles.

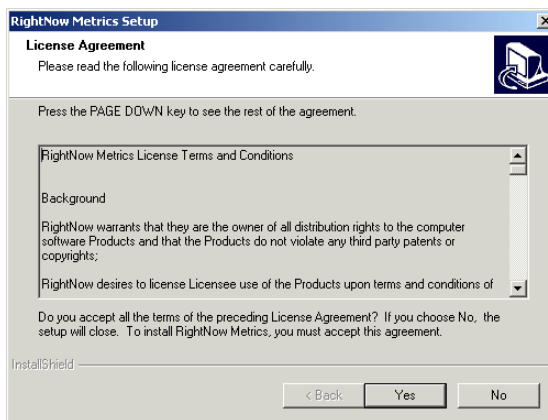
Note: If RightNow Metrics Setup encounters locked files, you will be required to reboot your server to commit final changes.


Running the Upgrade Program

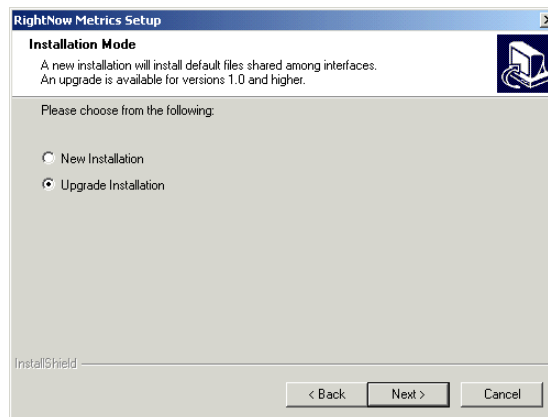
The windows displayed precede the accompanying instructions. To cancel from the program at any time, click . To return to the previous window(s), click .


To upgrade RightNow Metrics for Windows NT/2000 using MS-SQL or Oracle:

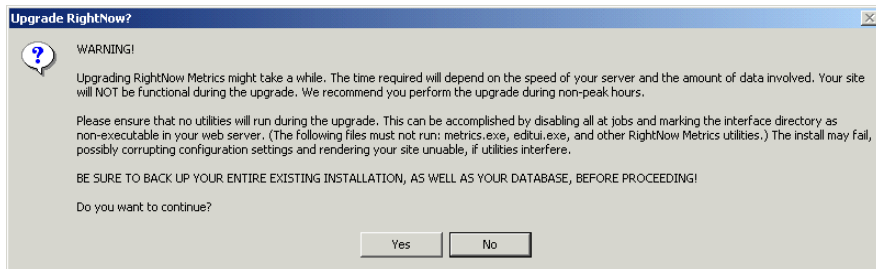
1. Log on to the Web server with full administrative privileges. You must upgrade RightNow Metrics as administrator on your Windows NT/2000 system so that RightNow Metrics has the correct permissions to create tables and insert, update, and delete records.
2. Open the RightNow Metrics executable file you downloaded to your computer to launch the RightNow Metrics setup program.




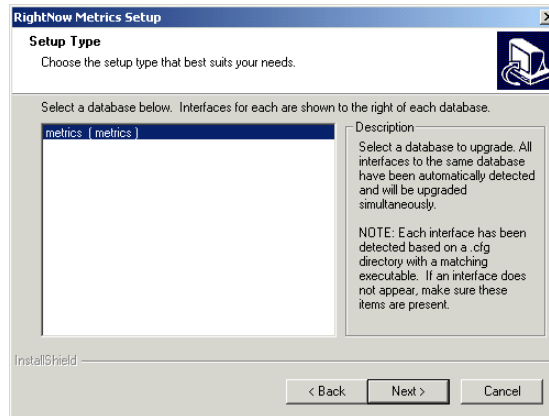
3. Click  if you agree to the license terms and conditions. You will open the Installation Mode window.




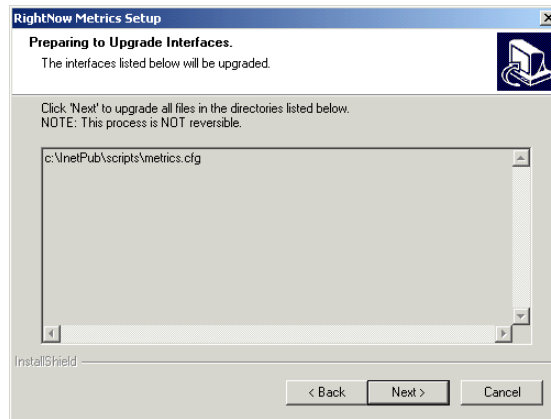
4. Select the **Upgrade Installation** radio button and then click  to open the Upgrade RightNow? window.




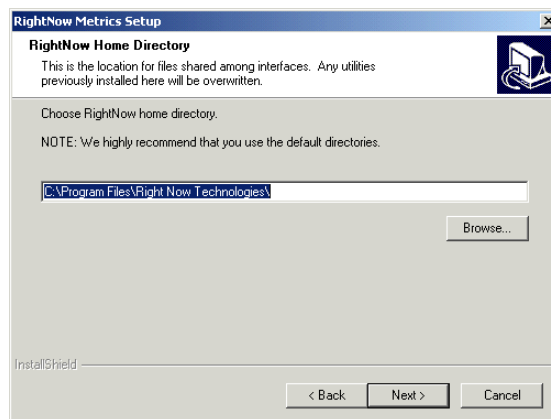
5. Before you begin the upgrade, make a backup of your database and entire existing installation of RightNow Metrics. Also, be sure that none of the RightNow Metrics utilities will be running during the upgrade process. Click  to open the Interface Maintenance window.





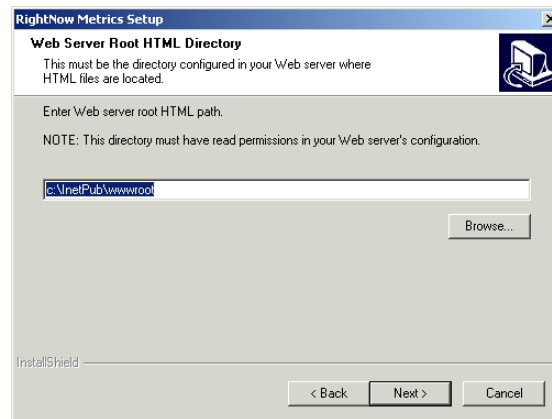
6. Select a databases to upgrade. If you have more than one database to upgrade, you will need to run the upgrade program separately for each one. The upgrade program reads the registry entries (HKEY_LOCAL_MACHINE>Software>Right Now Technologies>Right Now Metrics) and displays only the most current RightNow Metrics 4.x sites. Click  to open the Preparing to Upgrade Interfaces window.



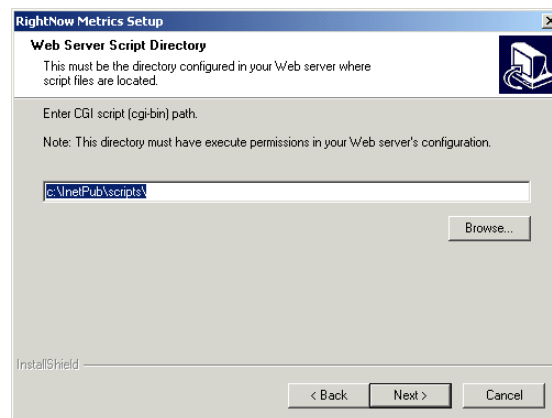
7. This window displays the physical location of each interface.*.cfg* directory that will be upgraded. Click  to open the RightNow Home Directory window.



8. Click  to accept the default RightNow Metrics home directory where the files shared between interfaces and the utilities will reside. To select another path, click . Once you have selected your directory, the Web Server Root HTML Directory window will open.

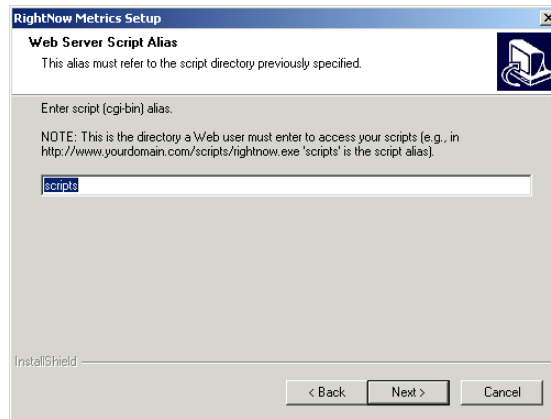


9. Click **Next >** to accept the default Web server root HTML path where the RightNow Metrics HTML files and images will be stored. To select another path, click **Browse...**. If you are not using Microsoft Internet Information Server (IIS), click **Browse...** to choose the Web server's document/content root. Once you have selected your directory, the Web Server Script Directory window will open.

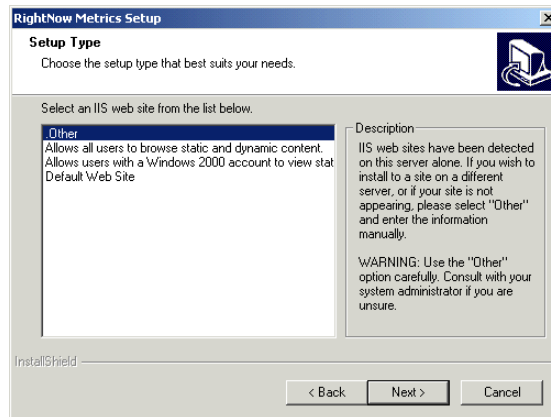


10. Click **Next >** to accept the default where the CGI applications will be stored on the Web server. To select another path, click **Browse...**. If you are not using IIS, click **Browse...** to choose the Web server's CGI directory. Once you have selected your directory, the Web Server Script Alias window will open.

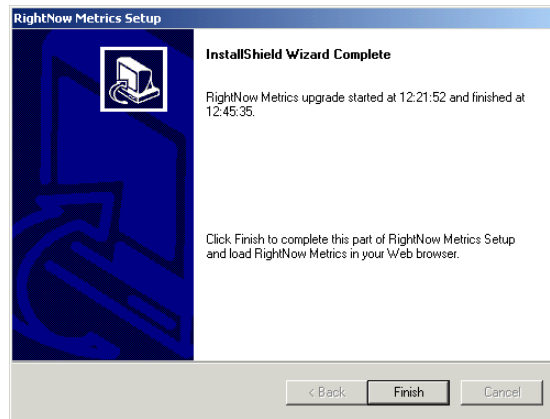
Note: The scripts directory must have execute permissions in the Web server's configuration.




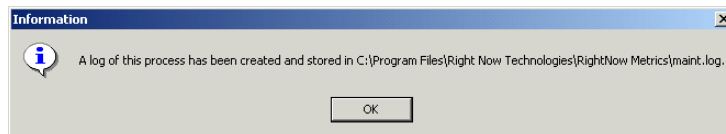
11. Click **Next >** to accept the default script alias that refers to the scripts directory. To choose another alias, type the alias you want in the text box and click **Next >**. Once you have selected your script alias, the Setup Type window opens.




12. This step is used to configure virtual directories for IIS. If you are running Microsoft Internet Information Server (IIS), this step detects any Web sites that are currently on your server. If the site you want to upgrade is listed, highlight the site and click **Next >**. If you want to install a site located on a different server or upgrade a site that is not listed, choose Other, then click **Next >** and refer to the following procedure.



The RightNow Metrics installation is complete. Click  to open a window containing information about the install log file.



A log file, *maint.log*, contains a record of each function performed during the upgrade. If any problems occurred during the upgrade, you can view this file to troubleshoot the problem.

13. Click  to complete this section of the upgrade process. Your Web browser will automatically open RightNow Metrics with this URL:

`http://<your_domain>/scripts/<your_interface>.cfg/metrics.exe`

Modified Directory Structure

After completing the upgrade, you have added and modified directories and files on your server. The following list includes the directories and files that have been modified.

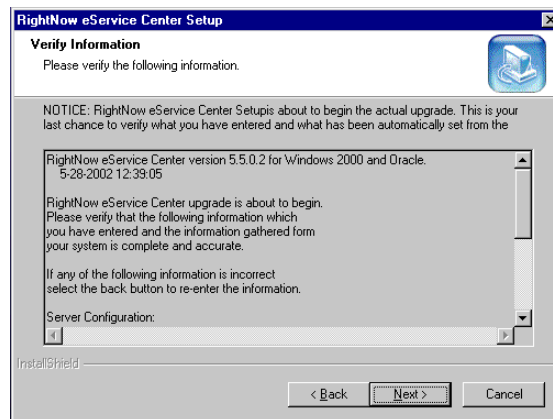
- RNT_Home directory (by default, C:\Program Files\Right Now Technologies)—This directory contains RightNow Metrics utilities and support files.
- HTML documents directory (by default, C:\InetPub\wwwroot)—This directory contains HTML files, images, and CSS files used to display the RightNow Metrics pages. Also contained is the dictionary used for the spell check feature.
- Scripts directory (by default, C:\InetPub\scripts)—This directory contains the .cfg directory and the *schedule.bat* file. The .cfg directory contains the RightNow Metrics executable, PHP executable, configuration setting files, and message base files.


Additional modified components include:

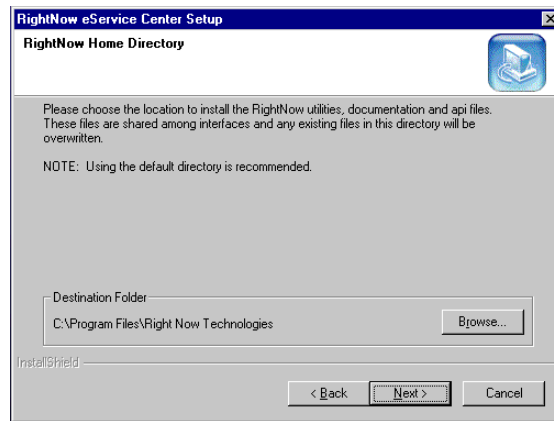
- Registry key—HKEY_LOCAL_MACHINE>Software>Microsoft>Windows>Current Version>Uninstall>8b614050-e551-11d3-aa3b-00e029471303
- Registry keys, including PRODUCT_VERSION located in HKEY_LOCAL_MACHINE>Software>Right Now Technologies>RightNow Metrics

Modifying Directory Information

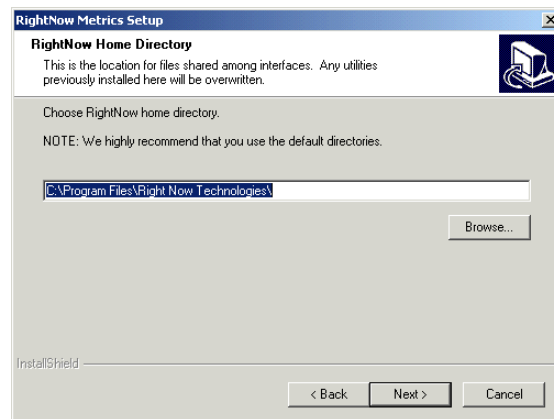
The following steps describe the process of modifying the directory paths of the RightNow installation from the default locations to the other locations. You will need to modify the directory paths if, during the installation of RightNow Metrics, directories other than the defaults were specified. This information will be used during the upgrade process. A series of three windows will be displayed prompting you for the paths of the RightNow Home, HTML, and Scripts directories. When you have completed these steps, you will return to the window in step 10 on page 3-15.



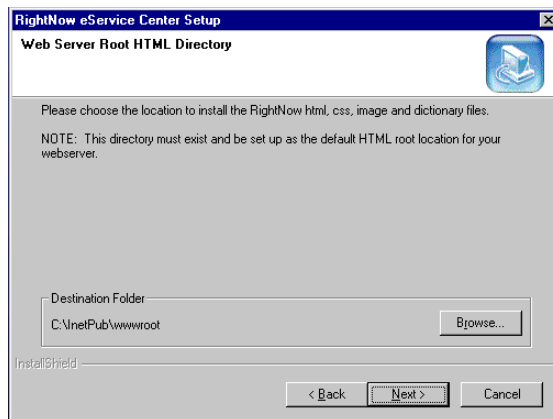
1. From step 10 on page 3-15, click  to modify the directory information.



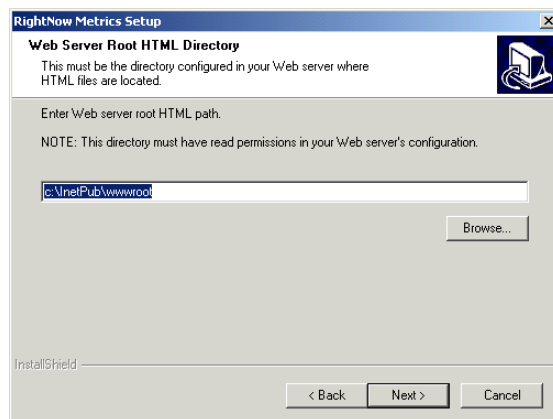
To select another path, click **Browse...**, choose the desired directory, and click **Next >**.



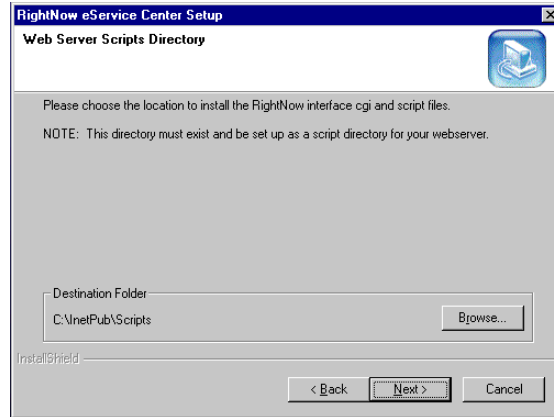
2. Click **Next >** to accept the default RightNow Metrics home directory where the files shared between interfaces and the utilities reside. The Web Server Root HTML Directory window opens.



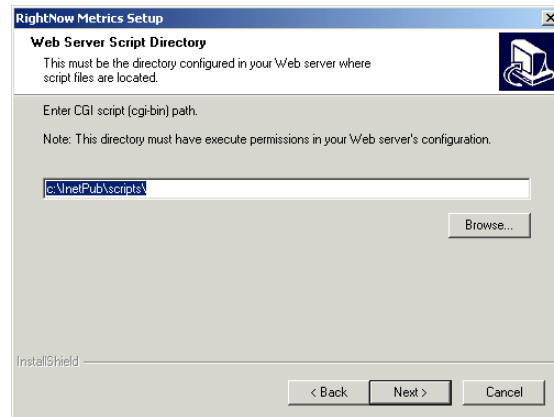
To select another path, click **Browse...**, choose the desired directory, and click **Next >**.



3. Click **Next >** to accept the default Web server root HTML path where the RightNow Metrics HTML files and images are stored. If you are not using Microsoft Internet Information Server (IIS), click **Browse...** to choose the Web server's document/content root and click **Next >**. The Web Server Scripts Directory window opens.



- To select another path, click **Browse...**, choose the desired directory, and click **Next >**.



4. Click **Next >** to accept the default scripts directory where the CGI applications will be stored on the Web server. If you are not using IIS, click **Browse...** to choose the Web server's CGI directory and click **Next >**. The Verify Information window will open. To continue with the upgrade procedure, go to step 10 on page 3-15.

Note: The scripts directory must have execute permissions on the Web server.

Troubleshooting

For the most immediate and up-to-date troubleshooting information, refer to the RightNow Technologies support database at: <http://rightnow.custhelp.com>. If you cannot find an answer to your problem, submit an incident to our Customer Support department at the same Web address. If you request assistance, you may need to provide your backup RightNow files and database. If you are operating behind a firewall, you will need to provide our Customer Support department with access to your site.

Restoring a Previous Version of RightNow Metrics

If you have difficulties during the RightNow Metrics upgrade, you can restore your RightNow Metrics site to the pre-upgrade backup. This section contains procedures for restoring your previous version of RightNow Metrics. Use the first method initially and in the unlikely event that this method does not work, use the second method.

Restoring previous versions of RightNow—Method 1:

1. Restore the three RightNow Metrics directory trees in their entirety from the pre-upgrade backup. For the paths of these directories, refer to “Step 1: Make Complete Backup Files” on page 3-2.
2. Restore the database from the pre-upgrade backup.
3. For Windows platforms, alter the `PRODUCT_VERSION` registry entry to reflect the pre-upgrade version. This registry is located in `HKEY_LOCAL_MACHINE > SOFTWARE > RightNow Technologies > RightNow Web`.

Restoring previous versions of RightNow—Method #2:

1. Uninstall RightNow Metrics on your production server. By uninstalling and reinstalling, the registries and *dll* libraries are updated.
2. Reinstall the version of RightNow Metrics you were previously using. Specify the most current backup copy of the database during the installation.
3. Overwrite the `.cfg` directories of the new installation with the pre-upgrade backup `.cfg` directories (excluding the executable, *common.msg*, and *php.ini*).

Integration

The Closed-Incident surveys feature of RightNow Metrics provides a powerful method of sending surveys in connection with an incident from eService Center or a ticket from another customer relationship management (CRM) software package. Because Closed-Incident surveys are automatically sent after an incident is solved, they provide an automated method for sending surveys to customers immediately after they have received services from your company. Using the sending rules feature, you can send specific surveys depending on the nature and type of the support request. This enables you to send tailored surveys that are pertinent to your customers.

To use the Closed-Incident survey feature, you must integrate RightNow Metrics with eService Center to receive an email message that will invoke the sending of a Closed-Incident survey. RightNow Metrics also has the ability to integrate with other CRM software packages.

New to this version of RightNow Metrics is the ability to integrate the RightNow Metrics login with the staff table in RightNow eService Center. This feature is available to organizations who are upgrading to this version of RightNow Metrics and have upgraded to eService Center 5.5.1. When enabled, the RightNow Metrics Login page will require the user name and password of an eService Center staff member.



You can perform the following types of integration:

- **Integrate with eService Center sharing a database**—This method is typically used with earlier versions of eService Center (3.2.3 or lower) or to take advantage of the new staff integration function in eService Center 5.5.1. Even if you are using a version of eService Center between 4.0.0 and 5.5.0, you may want to consider merging databases to take advantage of future functionality.
- **Integrate with eService Center with separate databases**—This type of integration can be used by organizations who do not want to use the staff integration functionality, but simply want their eService Center to integrate with RightNow Metrics by sending trigger emails.
- **Integrate with another CRM package**—This type of integration is used when an outside application can send a formatted email to RightNow Metrics. You will need to configure your CRM package to send an email to RightNow Metrics in the correct format.

For general information about RightNow eService Center, refer to the eService Center documentation or visit our Web site at:

<http://rightnow.com/products>

Integrating with eService Center

The integration between eService Center and RightNow Metrics can be configured differently depending on the version of eService Center you are using and whether you want to integrate RightNow Metrics with the staff accounts information in eService Center. You have the choice of sharing a database between eService Center and RightNow Metrics, or simply passing trigger emails from eService Center to RightNow Metrics without sharing a database. In either case, when an incident is set to a Solved status type in eService Center, RightNow Metrics is triggered to send a Closed-Incident survey. Field information about the incident is compared to the sending rules to determine the Closed-Incident survey that will be sent. (For more information on sending rules, refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32 in the *RightNow Metrics 4.3 User Manual*.)

One of the most important reasons to consider sharing a database is to be able to integrate RightNow Metrics with the eService Center staff accounts information. This will allow eService Center administrators to assign staff accounts permission to access RightNow Metrics. The staff members can then log in to RightNow Metrics using their eService Center user name and password. For more information, refer to “Integrating with eService Center Sharing a Database” on page 4-3.

If you do not want to use the staff accounts information integration functionality, you are not required to merge your eService Center and RightNow Metrics databases. For more information, refer to “Integrating with eService Center Using Separate Databases” on page 4-17.

Integrating with eService Center Sharing a Database

Although sharing a database is not required, it does allow you to perform a staff member integration. You can merge databases with any version of eService Center; however, having access to the staff accounts information requires an integration with eService Center version 5.5.1 or higher.



Integrating the staff accounts information will create staff accounts for RightNow Metrics. These staff members can use their eService Center user name and password to log in to RightNow Metrics, as shown in Figure 4-1.

Path: *RightNow Metrics URL*

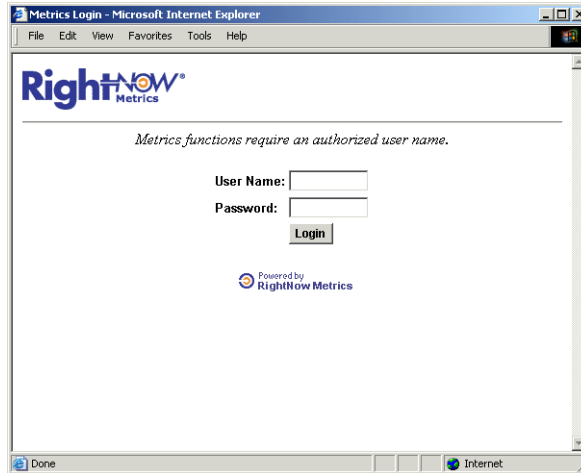




Figure 4-1: RightNow Metrics Login—Integrated with eService Center

In order for eService Center staff members to successfully log in to RightNow Metrics, they must have the appropriate profile settings. There are two options in eService Center that allow access:

- **Metrics Administrator**—This setting allows a staff member with the current profile complete access to RightNow Metrics. This includes being able to view, access, assign, and edit all launched and unlaunched surveys, regardless of which staff member created them.
- **Metrics User**—This setting allows a staff member with the current profile limited access to RightNow Metrics. Staff members with this profile are able to view, access, and edit only those surveys created by them.

As shown in Figure 4-2, these profile settings are available through the Profiles—Edit page.

Path: eService Center URL>  >Staff Management>Profiles> 

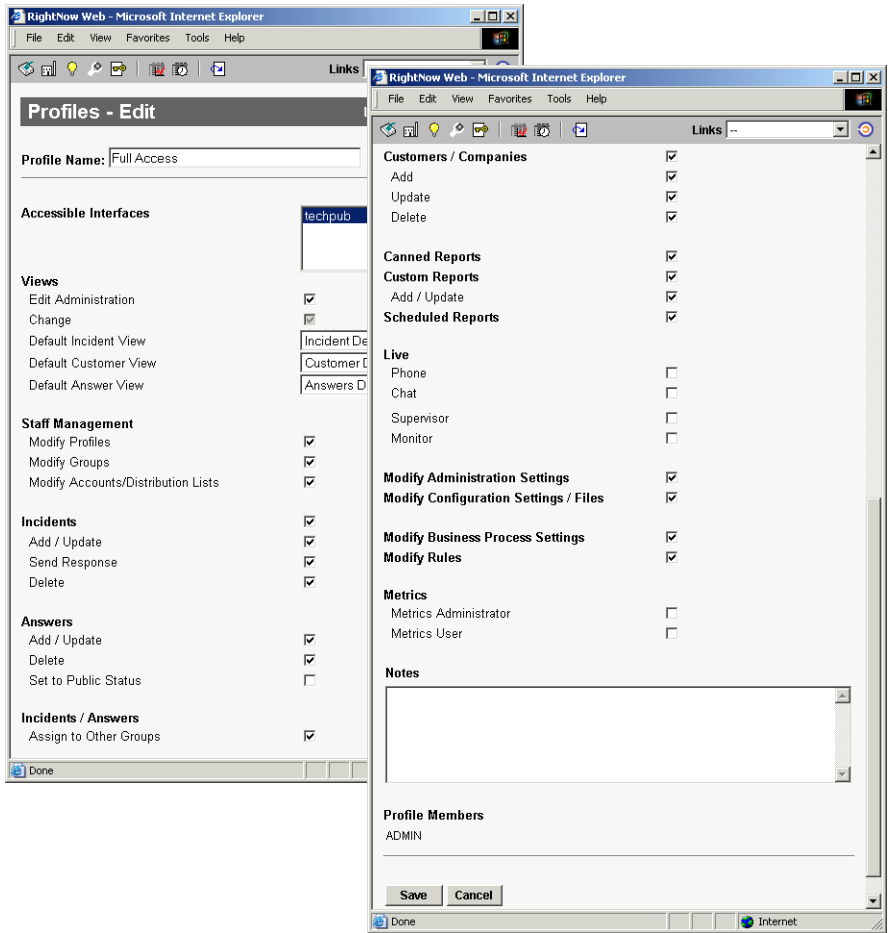


Figure 4-2: eService Center Profiles—Edit Page

You can edit the profile setting by clicking either Metrics Administrator or Metrics User on the Profiles—Edit page. All staff members assigned to this profile will be able to log in to RightNow Metrics using their eService Center user name and password. For more information on profiles, refer to the *RightNow eService Center 5.5 Administration Manual*.

Note: When performing the integration, RightNow Metrics will create a new staff member, group, and profile in RightNow Metrics. The profile, “METRICS,” has full access in eService Center, including Metrics Administration permissions. The staff account, also called “METRICS,” is assigned to this new profile, as well as the new group, “METRICS.”

Note: When you integrate RightNow Metrics 4.3 with eService Center 5.5.1, you will need to log in to eService Center to assign yourself with Metrics admin privileges through your profile setting, and other staff members with Metrics user privileges through their profiles. Once you have

configured the profiles, you will then need to log in to RightNow Metrics using your eService Center user name and password. When you upgrade from a previous version of RightNow Metrics and integrate with eService Center, all surveys will be automatically assigned to the Metrics administrator. In most cases, you will then want to reassign these surveys to a Metrics user. For specific procedures, refer to “Step 6: Logging in to RightNow Metrics” on page 4-11.

Performing an eService Center Integration

After you upgrade to RightNow Metrics 4.3, you can perform the following steps to merge your RightNow Metrics and eService Center databases. These steps will assist you in moving your current RightNow Metrics database into an eService Center database. You will configure eService Center to send emails to RightNow Metrics that trigger Closed-Incident surveys. In addition, the following configuration setting will be enabled in the process:

RightNow Metrics>General>RightNow Web>RNW_INTEGRATION

This setting enables the staff accounts information integration feature described in the preceding section.

Note: Hosted customers should contact their RightNow Technologies customer service representative to perform an integration.

Step 1: Disable your RightNow Metrics site

You will want to disable your RightNow Metrics site by renaming the RightNow Metrics and Web surveys executables (located in the `<intf>.cfg` directory for UNIX platforms or the `<interface.cfg` directory for Windows platforms) and renaming *pollster*.

Step 2: Export your data

Since you will be redirecting RightNow Metrics to your eService Center database, any existing data in your RightNow Metrics database will not be automatically transferred. You will need to export your database to a temporary location so you can import it later into your new shared database. This is accomplished using the utility *gexport*. For specific instructions on using *gexport*, refer to Chapter 11, “Utilities,” in the *RightNow Metrics 4.3 User Manual*.

Note: If you are moving RightNow Metrics data from and to the same database management system (DBMS) (for example, MySQL to MySQL or MS-SQL to MS-SQL), you can also use your native database export/import tools.

Note: You do not need to perform this step if you have no existing data in RightNow Metrics.

To export your data:

1. Create a temporary file to store your RightNow Metrics table.
2. Navigate to the following directory depending on your operating system:

UNIX:

`/usr/local/rnt/rnm/bin`

Windows NT/2000:

`c:\Program Files\Right Now Technologies\Right Now Metrics\bin`

3. Export your database using the following syntax:

`gexport -d <path_name> <your_interface>`

A CSV and an IMP file for all your RightNow Metrics tables will be exported to your temporary file located at <path_name>.

Step 3: Redirect your database

In this step, you will drop your current database from RightNow Metrics and redirect it to your eService Center database. You will then need to create tables for RightNow Metrics using the utility *rnm_dbaudit*. While performing this step, RightNow Metrics will enable the staff accounts information integration feature (enable the RightNow Metrics>General>RightNow Web>RNW_INTEGRATION configuration setting) provided you have RightNow Metrics version 4.3 and eService Center version 5.5.1 or higher. It will also create a new staff member, group, and profile in RightNow Metrics. The profile, "METRICS," has full access in eService Center, including Metrics Administration permissions. The staff account, also called "METRICS," is assigned to this new profile, as well as the new group, "METRICS." This account can then log in to RightNow Metrics using the user name, "METRICSADMIN." The password is blank by default.

To redirect your database:

1. Log in to RightNow Metrics using your password specified in SURV_ADMIN_PASSWD.
2. Click **Configuration** to open the RightNow Metrics General Configuration Menu.

Path: Metrics Login Page>Configuration



Figure 4-3: RightNow Metrics Configuration Editor

3. Click Common.
4. Under Database, modify the following settings depending on your type of database:

Oracle:

DB_LOGIN
 DB_PASSWD
 ORACLE_HOME
 ORACLE_SID
 ORACLE_SERVICE
 ORACLE_DATA_TS
 ORACLE_INDEX_TS

MS-SQL:

DB_LOGIN
 DB_PASSWD
 ODBC_DSN

MySQL:

DB_LOGIN
 DB_PASSWD
 DB_NAME
 SERVER_NAME (remote DBMS only)

Note: You may not have a database login or password with MySQL.

These settings should be changed to correspond to your eService Center database settings. If you are unsure of these specific settings, consult your eService Center database administrator for this information.

You must now create the RightNow Metrics tables in your eService Center database, using the utility *rnm_dbaudit*. For specific instructions on running utilities, refer to Chapter 11, “Utilities,” in the *RightNow Metrics 4.3 User Manual*.

5. Navigate to the following directory depending on your operating system:

UNIX:

/usr/local/rnt/rnm/bin

Windows NT/2000:

c:\Program Files\Right Now Technologies\Right Now Metrics\bin

6. Create your database tables using the following syntax:

rnm_dbaudit <your_interface>

Note: You must now log in to RightNow Metrics using the user name “METRICSADMIN.” By default, the password is blank.

Step 4: Import your data

If you exported your data in RightNow Metrics in step 1, you will need to import your data into your eService Center database. This is accomplished using the utility *gimport*. For specific instructions on using *gimport*, refer to Chapter 7, “Utilities,” in the *RightNow Metrics 4.3 User Manual*.

Note: You do not need to perform this step if you did not perform step 1.

To import your data:

1. Navigate to the following directory depending on your operating system:

UNIX:

`/usr/local/rnt/rnm/bin`

Windows NT/2000:

`c:\Program Files\Right Now Technologies\Right Now Metrics\bin`

2. Import your database using the following syntax:

`gimport -d <path_name> <your_interface>`

The CSV and IMP files located in the temporary file (<path_name>) you created in step 1 will be imported into your eService Center database.

Step 5: Configure eService Center and RightNow Metrics

Your next step is to configure eService Center and RightNow Metrics to communicate via trigger emails. You need to make sure that several eService Center and RightNow Metrics configuration settings are properly set, as well as create a mailbox in eService Center. After performing this step, RightNow Metrics will be able to send Closed-Incident surveys after an incident is marked solved in eService Center.

Note: Some steps in the following procedure may have already been performed in your eService Center installation, depending on whether your eService Center administrator configured email management.

To configure eService Center and RightNow Metrics:

1. Log in to eService Center. For specific procedures, refer to the *RightNow eService Center 5.5 Administration Manual*.
2. From the Management and Configuration page, click Settings under Configuration Editor.

Path: Administration Login Page >  > **Settings**

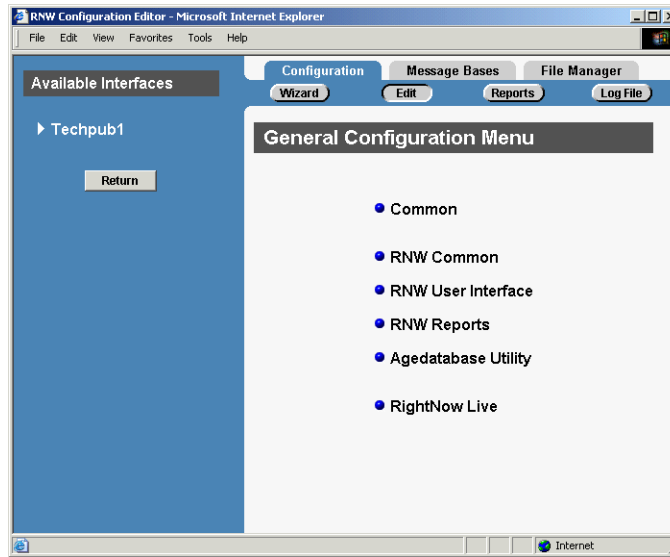


Figure 4-4: eService Center Configuration Editor

Note: If you are currently using eService Center, some of these settings may already be configured.

3. Click **Common** to open the Common Configuration Settings menu.
4. Click the following settings, customize the setting, and click **Update** after customizing each setting.

Table 4-1: eService Center Common Configuration Settings for Integration

Configuration Setting	Value
General>Outgoing Email>OE_SMTP_SERVER	Type the name of your outgoing mail server.
General>Outgoing Email>OE_WEB_SERVER	Type the name of you Web server.

5. Click **Commit and Exit** to save the values and return to the General Configuration Menu.
6. Click **RNW Common** to open the RNW Common Configuration Settings menu.


7. Click the following settings, customize the setting, and click  after customizing each setting.

Table 4-2: eService Center RNW Common Configuration Settings for Integration

Configuration Setting	Value
Modules>RightNow Metrics Integra- tion>RNM_ENABLED	Click Yes to enable the integration feature that sends trigger emails from eService Center to RightNow Metrics when an incident is set to the Solved status.
Modules>RightNow Metrics Integra- tion>RNM_EMAIL_INTERFACE	Type the email address where eService Center sends trigger emails. Note: This email address must be used in the Reply To setting of your Closed-Incident surveys. The RightNow Metrics utility <i>pollster</i> will access this mail-box to parse the incoming mail for trigger emails.





8. Click  to save the values and return to the General Configuration Menu.
9. Click RNW User Interface to open the RNW User Interface Configuration Settings menu.
10. Click the following setting, customize the setting, and click .

Table 4-3: eService Center RNW User Interface Configuration Settings for Integration

Configuration Setting	Value
Tool Bar>Links>TBAR_METRICS_URL	Type the URL of your RightNow Metrics site. You can enter the URL of any main page within RightNow Metrics, for example Active Surveys, Survey Workbench, Addresses, Noti-fication Console, or Questions. From the eService Center administration pages, you can the open RightNow Metrics from the Links drop-down menu.

11. Click  to save the value and return to the General Configuration Menu.
12. Click  to return to the Management and Configuration page.
13. Click Mailboxes under Email.
14. Add at least one mailbox to your eService Center. For specific procedures on adding a mail-box, refer to the *RightNow eService Center 5.5 Administration Manual*.

You have finished configuring eService Center. Refer to the next section for procedures on log-ging in and configuring RightNow Metrics.

Step 6: Logging in to RightNow Metrics

When you integrate RightNow Metrics 4.3 with eService Center, you can share the eService Center staff accounts information. Staff members from eService Center with proper permissions in their profile can log in to RightNow Metrics using their eService Center user name and password. For information about integrating RightNow Metrics with eService Center, refer to Chapter 10 in this manual.

Before eService Center staff members can successfully log in to RightNow Metrics, they must have the appropriate profile settings. Therefore, you must first log in to eService Center and assign staff members RightNow Metrics privileges.

There are two options in eService Center that allow access to RightNow Metrics:

- **Metrics Administrator**—This setting allows a staff member with the current profile complete access to RightNow Metrics. This includes being able to view, access, assign, and edit all launched and unlaunched surveys, regardless of which staff member created them.
- **Metrics User**—This setting allows a staff member with the current profile limited access to RightNow Metrics. Staff members with this profile are able to view, access, and edit only those surveys created by them.

As shown in Figure 4-5, these profile settings are available through the Profiles—Edit page.

Path: eService Center URL>  >Staff Management>Profiles> 

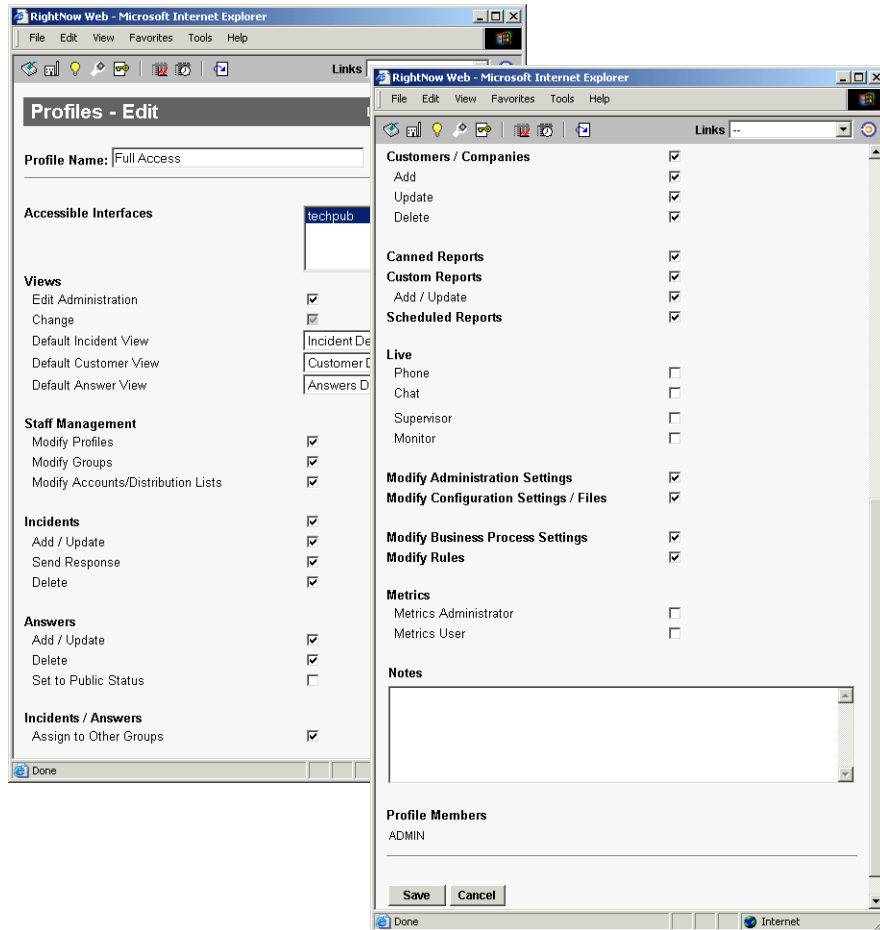




Figure 4-5: eService Center Profiles—Edit Page

You can edit the profile setting by clicking either Metrics Administrator or Metrics User on the Profiles—Edit page. All staff members assigned to this profile will be able to log in to RightNow Metrics using their eService Center user name and password. For more information on profiles, refer to the *RightNow eService Center 5.5 Administration Manual*.

Note: When performing the integration, RightNow Metrics will create a new staff member, group, and profile in RightNow Metrics. The profile, “METRICS,” has full access in eService Center, including Metrics Administration permissions. The staff account, also called “METRICS,” is assigned to this new profile, as well as the new group, “METRICS.”

To log in to RightNow Metrics integrated with RightNow eService Center:

1. Log in to RightNow eService Center as a user with full administration privileges (admin).

2. Click  to open the Management and Configuration page.
3. Click Profiles under Staff Management.
4. Click  next to Metrics Admin. Assign at least one staff member to this profile to allow full Metrics administration privileges.

Note: All surveys are initially assigned to the administrator (Admin).

5. Assign other staff members to the Metrics User profile or another profile that contains Metrics User privileges. Those staff members will be able to view, access, and edit only those surveys created by them.
1. Once you have installed and configured RightNow Metrics, type the URL for your particular installation:

RightNow Technologies hosted environment

`http://<your_interface>.custhelp.com/cgi-bin/<interface>.cfg/metrics`

Note: Contact your customer service representative to obtain your URL for sites hosted by a facility other than RightNow Technologies.

UNIX

`http://<your_domain>/cgi-bin/<interface>.cfg/metrics`


Windows NT/ 2000

`http://<your_domain>/scripts/<interface>.cfg/metrics.exe`

2. Press **Enter** to open the Metrics Login page.



Figure 4-6: Metrics Login Page

3. Type your eService Center user name and password and click . The Active Surveys page will open.

Path: Metrics Login> **Login**

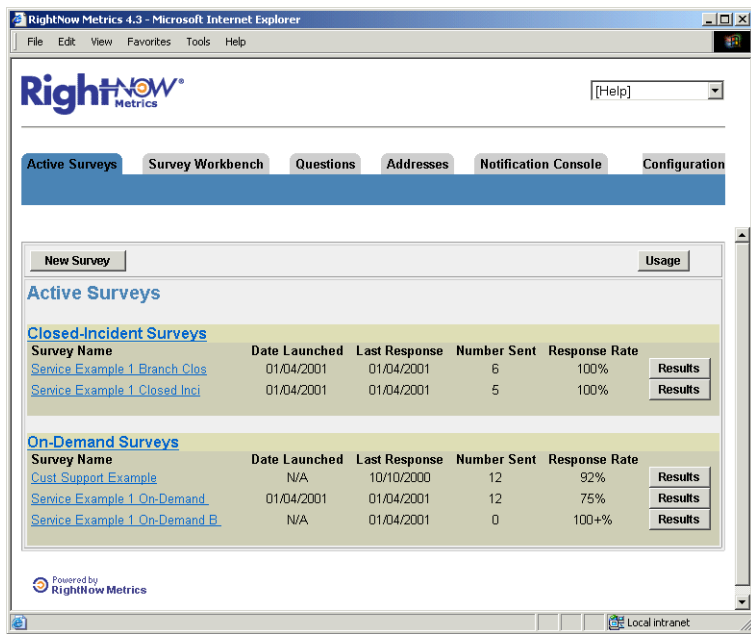


Figure 4-7: Active Surveys—Entry into RightNow Metrics

- 4. Click **Configuration** to open the General Configuration Menu (refer to Figure 4-3, “Right-Now Metrics Configuration Editor,” on page 4-6).
- 5. Click RightNow Metrics to open the RightNow Metrics General Configuration Menu.
- 6. Click the following setting, customize the setting, and click **Update**.

Table 4-4: RightNow Metrics Configuration Settings for Integration

Configuration Setting	Value
General>RightNow Web>RNW_URL	Type the URL of the eService Center interface you are integrating with. This will display a link, <u>Go to Right-Now eService Center</u> , in RightNow Metrics that will link to the Login page of eService Center.

- 7. Click **Commit and Exit** to save the values and return to the General Configuration Menu.
- 8. Click **Close Configuration** to close the Configuration Editor.
- 9. Click **Survey Workbench** to open the Survey Workbench to reassgn the surveys.

Note: When you integrate RightNow Metrics with eService Center 5.5.1, all existing surveys will automatically be assigned to the Metrics administrator. You will need to reassign these surveys to give Metrics users ownership of these surveys.

Path: **Survey Workbench**

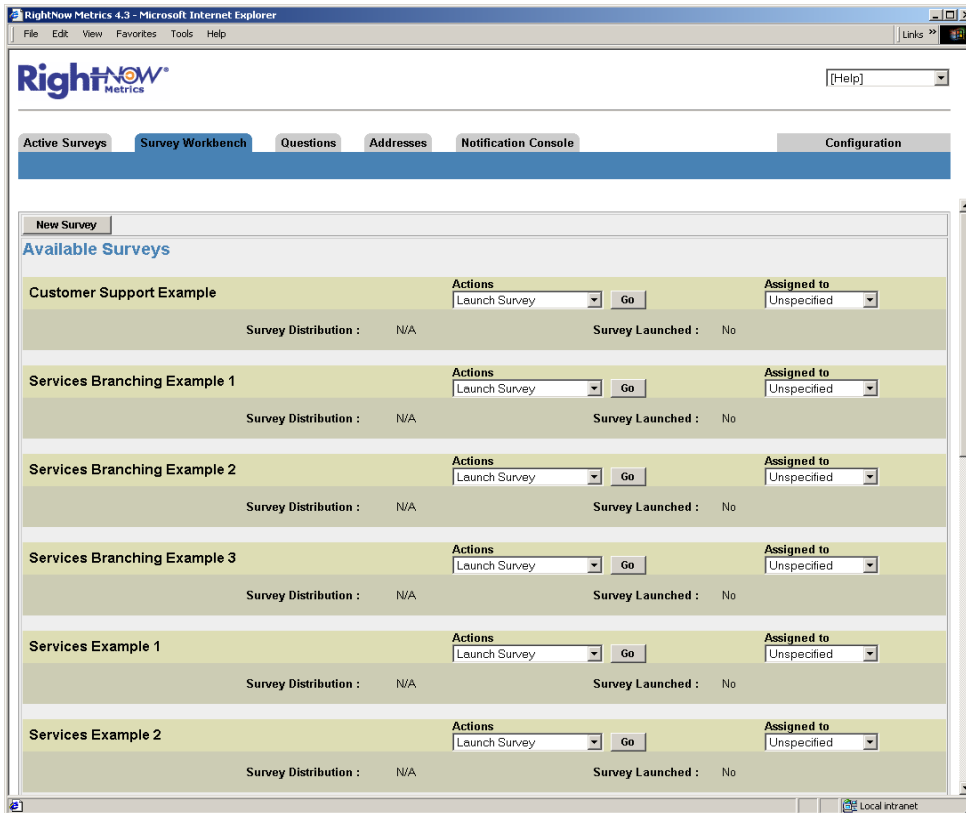


Figure 4-8: Survey Workbench

- Click the Assigned to drop-down menu associated with each survey to reassign the survey to a Metrics user. That user now has full privileges to view, edit, and delete the surveys assigned to them.

You have now completely configured eService Center to send trigger emails to RightNow Metrics and share staff member accounts. RightNow Metrics and eService Center have also been customized to show links to the other product for quick access.

Step 7: Create a Closed-Incident survey

To complete the integration process, you need to configure RightNow Metrics to send Closed-Incident surveys. You will first need to create and launch a Closed-Incident survey. For more information, refer to Chapter 4, “Survey Workbench,” in the *RightNow Metrics 4.3 User Manual*.

Note: The Reply To setting of the Closed-Incident surveys must be properly configured when you launch each Closed-Incident survey and depends on the distribution method. If your distribution method is email only and you are integrating with eService Center, this setting must be the same email address as you specified in the configuration setting, RNW Common>Modules>RightNow Metrics Integration>RNM_EMAIL_INTERFACE. If you are integrating with another CRM package, the Reply To email address must be the same as the email address where trigger emails are sent. If you are sending a Web-based survey, you will want to send to survey to either the survey owner or the eService Center mailbox.

You will also need to create sending rules for the Closed-Incident surveys. The sending rules feature in RightNow Metrics enables you to send Closed-Incident surveys that are specific to the nature and type of eService Center incidents or CRM tickets that customers submit to your organization. You specify the criteria (in the form of sending rules) that determine when each Closed-Incident survey will be sent. For more information, refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32 of the *RightNow Metrics 4.3 User Manual*.

Note: You must have sending rules specified for Closed-Incident surveys to be sent.

Once you have integrated with eService Center, created Closed-Incident surveys, and specified sending rules, eService Center will send trigger emails each time an incident is set to a Solved status type (manually or by the system) to the mailbox specified in the eService Center configuration setting:

RNW Common>Modules>RightNow Metrics Integration>RNM_EMAIL_INTERFACE

The *pollster* utility of RightNow Metrics will access this mailbox (specified in the Mail Server and User Name survey setting to the Closed-Incident survey) and parse the email for the incident information, including product, sub-product, category, sub-category, staff, group, and contact information. This information will be compared to the sending rules to determine which Closed-Incident survey to send. If a match is made or there is a DEFAULT sending rule, a Closed-Incident survey will be sent to the email address from the original eService Center incident. This survey will be sent in accordance with the Percent to Mail and Send Delay setting. For more information about the *pollster* utility, refer to Chapter 11, “Utilities,” in the *RightNow Metrics 4.3 User Manual*.

Integrating with eService Center Using Separate Databases

This method of integration is implemented when you do not want to use the eService Center staff accounts information in RightNow Metrics. You can also perform this type of integration when you are integrating RightNow Metrics with a version of eService Center earlier than 5.5.1. In this method, RightNow Metrics has its own separate database operating independently of eService Center.

Note: Even if you do not plan on using the new staff accounts information integration functionality, we recommend that you consider merging your eService Center and RightNow Metrics databases to take advantage of future functionality and enhancements.

When eService Center and RightNow Metrics do not share a database, you cannot enable the staff accounts information integration (described in “Integrating with eService Center Sharing a Database” on page 4-3). Therefore, you will continue to log in to RightNow Metrics using only the password specified in:

RightNow Metrics>General>Survey Settings>SURV_ADMIN_PASSWD.

When RightNow Metrics is integrated with eService Center using this method, a trigger email is still sent to RightNow Metrics each time an incident is set to the Solved status type. RightNow Metrics automatically reads this email for information about the incident, including the customer’s email address and the incident’s subject, product, sub-product, category, sub-category, staff assignment, group assignment, and reference number. The information is then compared to the sending rules for each Closed-Incident survey to determine which survey will be sent. (For more information on sending rules, refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32 of the *RightNow Metrics 4.3 User Manual*.)

To enable this integration with eService Center, you should perform **only** steps 4 and 5 in “Performing an eService Center Integration” on page 4-5. After following these procedures, RightNow Metrics will be successfully integrated with eService Center using separate databases.

Integrating RightNow Metrics with CRM Software

RightNow Metrics has the capability to be integrated with CRM software packages by accepting an email to trigger a Closed-Incident survey. This allows you to enable Closed-Incident surveys in conjunction with actions from your CRM software.

Note: For more information on survey settings, refer to Chapter 6, “Active Surveys,” in the *RightNow Metrics 4.3 User Manual*.

The *pollster* utility of RightNow Metrics will access the mailbox specified in the Mail Server and User Name survey settings to the Closed-Incident survey and parse the email for the field information, including product, sub-product, category, sub-category, staff, group, and contact information. This information will be compared to the sending rules to determine which Closed-Incident survey to send. If a match is made or there is a DEFAULT survey, a Closed-Incident survey will be sent to the email address in the field information. (For more information on sending rules, refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32 in the *RightNow Metrics 4.3 User Manual*.) This survey will be sent in accordance with the Percent to Mail and Send Delay setting.

Note: You must have sending rules specified for Closed-Incident surveys to be sent.

The trigger email must be sent to the mailbox used by RightNow Metrics to collect trigger emails and survey responses.

To integrate with CRM software, you must create an event in your CRM software that sends an email message in the proper format. The format for the remote messages requesting a Closed-Incident survey is as follows:

```
Subject: [id#username@company.com;0;0] Survey Title
TITLE: incident title;
PRODUCT: metrics;
SUBPRODUCT: CI request feature;
CATEGORY: software;
SUBCATEGORY: updates;
ASSIGNED: jon doe;
GROUP: development;
REF_NO: 0000901-000001
CONTACT: Jim Smith
```

Subject—The subject line consists of a bracketed group of information and an optional survey title. An email subject may follow the closing bracket, but is not necessary and will be discarded by the *pollster* utility. In the brackets there are three fields separated by semicolons:

- The first field is the email address of the survey recipient. The email must begin with **id#** followed by the email address of the survey recipient’s mailbox. This syntax must be used for the email address to be properly identified by the *pollster* utility. For more information on the *pollster* utility, refer to Chapter 11, “Utilities,” in the *RightNow Metrics 4.3 User Manual*.
- The second field is the response identification field. A zero in this field indicates to the *pollster* utility that this email is a Closed-Incident survey trigger rather than a response to a sur-

vey. There is a semi-colon separator following the zero.

- The last field is a security parity check value which ensures that RightNow Metrics will not accept email messages from unknown sources. This is followed by a closing bracket.

Note: This field is not currently enabled.

Body Fields—The body of the email message is optional. Keyword fields can be specified in the message body to provide data about the incident and to determine the content of the survey. If included, the keyword information is stored in the RightNow Metrics database.

All keywords must be upper case and include a colon at the end. This helps differentiate keywords from identical text. The *pollster* utility locates the keyword and extracts all the text for the field up to a semi-colon, or carriage return. The semi-colon allows for more than one keyword per line. Any other text or comments in the email body that are not in this format are ignored. The contact field should be in the format <first name> <last name>. This information is used to personalize the greeting in your Closed-Incident survey.

To complete the integration, you must create Closed-Incident surveys and sending rules. For more information on sending rules, refer to “Applying Sending Rules to Closed-Incident Surveys” on page 6-32 in the *RightNow Metrics 4.3 User Manual*.

Evaluating Your Upgrade

After upgrading to a new version of RightNow Metrics, it is important to verify that all your survey data is still correct and that your RightNow Metrics site is functioning properly. Use the following guidelines to evaluate your RightNow Metrics upgrade site.

Note: If you are hosted by RightNow Technologies and find data missing, update your incident through the My Stuff page at <http://rightnow.custhelp.com>. If you are a non-hosted customer and you find data missing, refer to “Restoring a Previous Version of RightNow Metrics” on page 3-23.

Evaluation Guidelines

Integration

If you integrated RightNow Metrics 4.3.x with RightNow eService Center 5.5.1.x, you will have access to the eService Center staff accounts. Once you set up their profiles, staff members can use their eService Center user name and password to log in to RightNow Metrics as shown in “RightNow Metrics Login Page—Integrated with eService Center” on page 5-1.

Path: *RightNow Metrics URL*

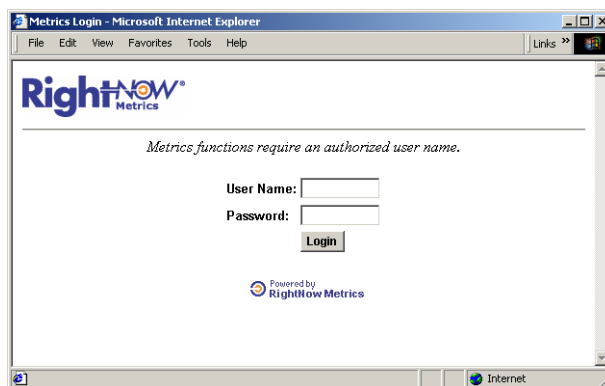


Figure 5-1: RightNow Metrics Login Page—Integrated with eService Center

To log in to your integrated RightNow Metrics site, enter **metricsadmin**. The password is blank by default. For more information on sharing staff accounts with eService Center and configuring staff accounts and profiles, refer to the *RightNow Metrics 4.3 User Manual*.

If RightNow Metrics is not integrated with eService Center, you will only be required to enter a password when you open the RightNow Metrics Login page, which is identical to the RightNow Metrics Login page for previous versions.

Active Surveys

- Click [Active Surveys](#) to make sure all of your active surveys are listed.
- Click each survey to check the survey details.

Survey Workbench

Click [Survey Workbench](#) to make sure all your available surveys are listed.

Questions

Click [Questions](#) to check all available questions and the questions available in each library.

Addresses

Click Addresses to check your list of email addresses.

Notification Console

Click [Notification Console](#) to check your list of notification rules and email addresses associated with those rules.

Once you have completed the evaluation of your upgraded RightNow Metrics site, you are ready to review the new features included in this version of RightNow Metrics. For a complete list of new features, refer to the *RightNow Metrics 4.3 Release Notes*. For more detailed information about these features, refer to the *RightNow Metrics 4.3 New and Expanded Features* document and the *RightNow Metrics 4.3 User Manual*.